Job Aid:
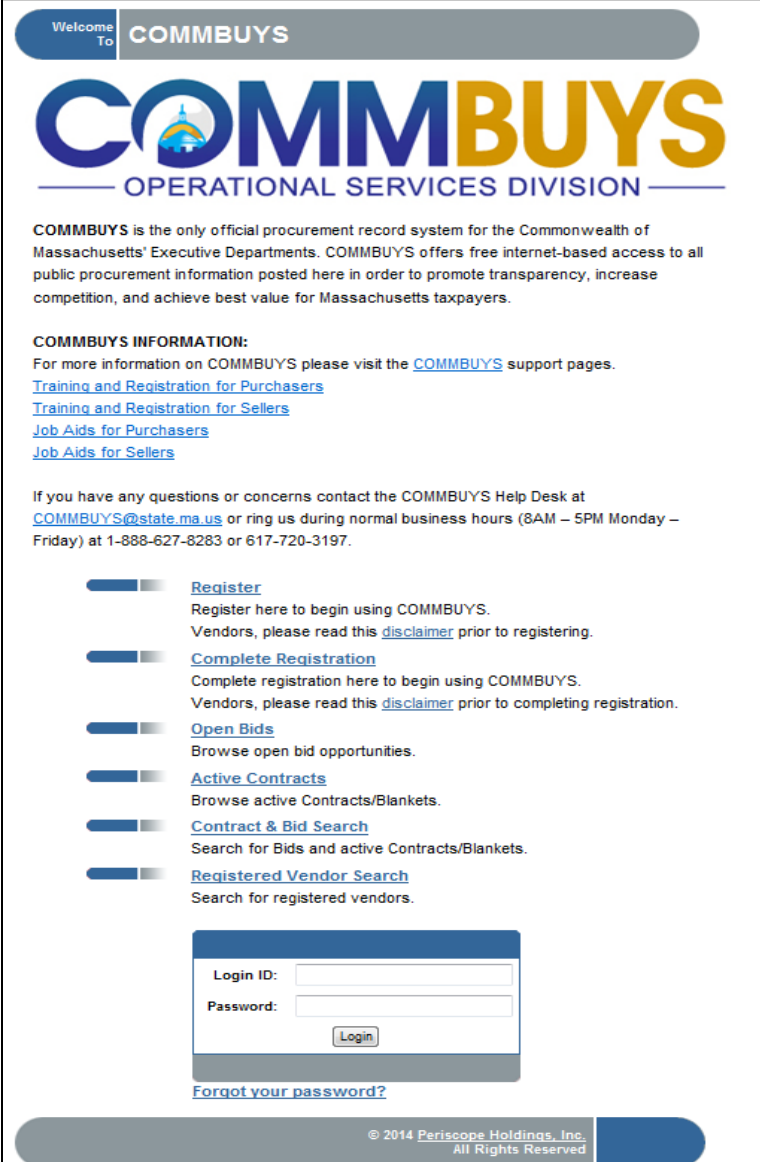## How to Create a Grant Posting from Scratch in COMMBUYS

This Job Aid shows how to:

- Create a Grant from Scratch in COMMBUYS

Of Special Note:

Please note that COMMBUYS is authorized by the Office of the Comptroller (OSC) for use in providing formal public notice of grant opportunities and awards. Those entities that are subject to oversight by OSC must follow the applicable OSC grant's policies and regulations, which can be found at the OSC website at http://www.mass.gov/osc.

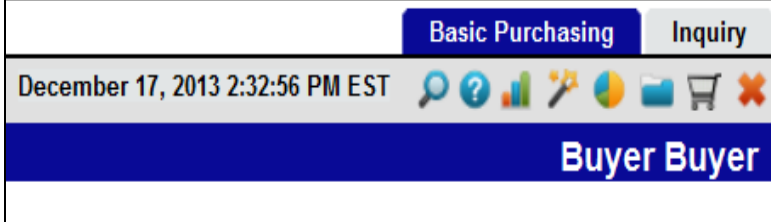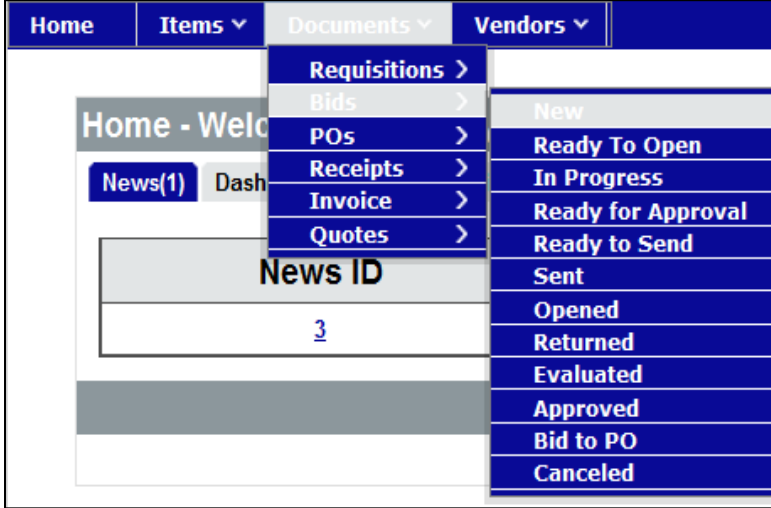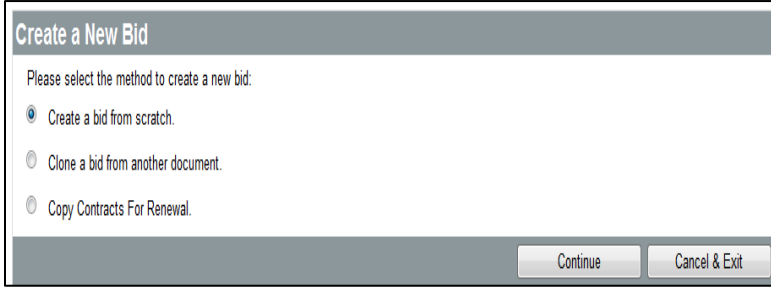Bids (Grants) are documents used to request responses (quotes) from potential Grantees. This job aid will start at the

	Directions
	Step 1 Launch the COMMBUYS website by entering the URL https://www.commbuys.com/bso/ in the browser. Enter your Login ID and Password.

point of creating a new bid for posting Grants, which is a very similar process to posting any other bid document.
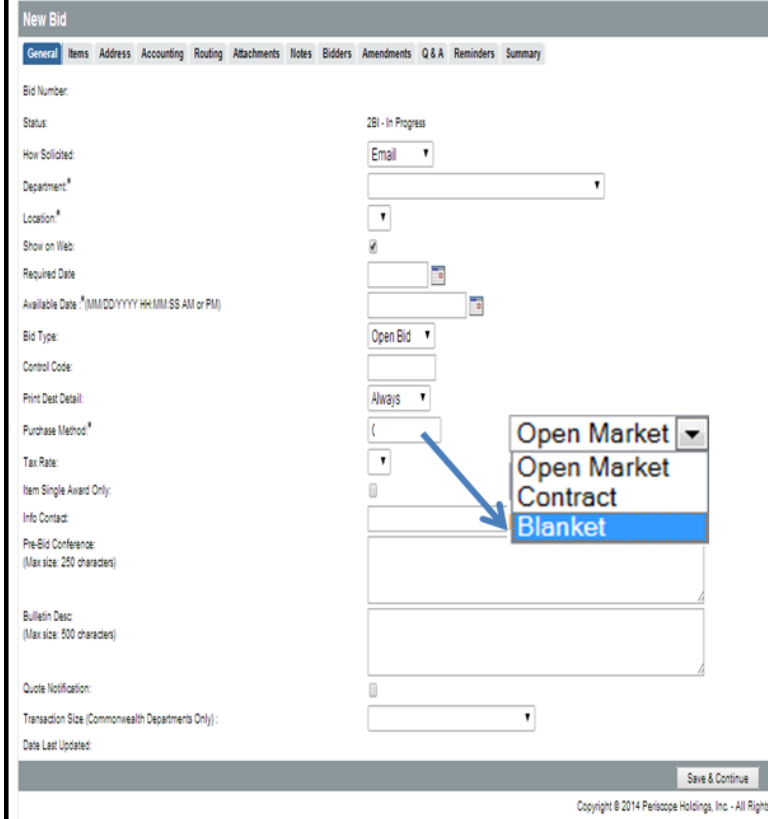
	Step 2 Upon successful login, select the **Basic Purchasing** role on the upper right side of the page.
	Step 3 From the Navigation Bar, select **Documents > Bids > New.**
	Step 4 1. Select the **Create a bid from scratch** radio button. 2. Click the **Continue** button.

New Bid

General | Items | Address | Accounting | Routing | Attachments | Notes | Bidders | Amendments | Q & A | Reminders | Summary

Bid Number:

Status: 2BI - In Progress

How Solicited: Email

Department:*

Location:*

Show on Web: ✓

Required Date:

Available Date:* (MM/DD/YYYY HH:MM:SS AM or PM)

Bid Type: Open Bid

Control Code:

Print Dest Detail: Always

Purchase Method:*

Open Market
Open Market
Contract
Blanket

Tax Rate:

Item Single Award Only:

Info Contact:

Pre-Bid Conference:
(Max size: 250 characters)

Bulletin Desc:
(Max size: 500 characters)

Quote Notification:

Transaction Size (Commonwealth Departments Only):

Date Last Updated:

Save & Continue

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Step 5a

This is the left half of the Bid General tab where you select the Bid Opening/Closing date and contract dates (if applicable). COMMBUYS generates a BID number after you save your information on the General tab.

Mandatory fields for BID:

- **Available Date:** The date a Grantee is able to open and download the Grant application and other documents. Grantees can also begin to enter online responses at this time. For Best Value Grant Notices of Intent to Award, the date would be the date of the Notice.

- **Bid Opening Date:** The date selected on the Bid (Grant) when the response period is closed to the respondent. COMMBUYS will no longer accept quotes for that Bid and the Grantor is able to open and view quotes. For Best Value Grant Notices of Intent to Award, the date would be the final date for any challenges to be filed related to the Notice.

- **Allow Electronic Response:** Check if the Grantees are submitting their applications as electronic quotes within COMMBUYS. If there is an alternate application submission method, uncheck this box. For Best Value Grant Notices of Intent to Award, this box would be unchecked.

Mandatory fields for Blanket:

- **Purchase Method dropdown**: Select Blanket. Once Blanket is selected, two additional fields requiring input- populate:

1. **Blanket Begin Date**: The anticipated beginning date of a contract or award. Click the calendar icon to select blanket start date.

2. **Blanket End Dates**: Enter the anticipated contract or award end dates using the calendar icon. Click the **Save & Continue** button when finished.

NOTE: all fields that list an * are required.

Description:*	[ ]
Purchaser:*	Buyer, Buyer ▼
Type Code:	▼
Fiscal Year:*	2015 ▼
Organization:	Operational Services Division
Allow Electronic Response:	☑
Bid Opening Date:*(MM/DD/YYYY HH:MM:SS AM or PM)	[ ] 📅
Purge Date:(MM/DD/YYYY)	[ ] 📅
Informal Bid:	☐
Estimated Cost:	$0.00
Alternate ID:	[ ]
Print Format: *	Bid Print Form ▼
Solicitation Enabled:	No
User last Updated:	

Step 5b

This is the right half of the Bid General tab. The **Type Code dropdown d**etermines master blanket type.

- Select **Type Code NS**, Non-Statewide Solicitation only.

NOTE: DO NOT USE Purge Date.
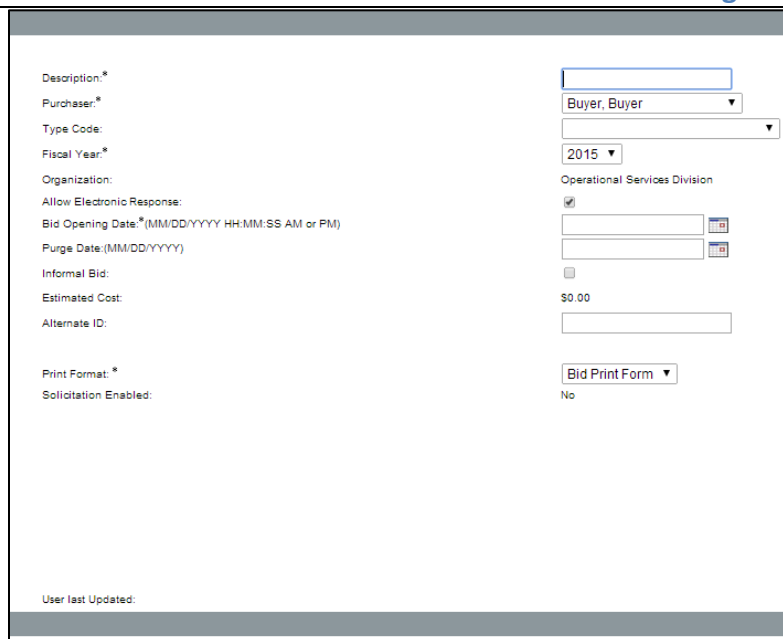
Optional fields:
- Select How Solicited from dropdown:

Email (default), Fax or Telephone

If not automatically populated, select from dropdowns:
- Your **Department**
- Your **Location**
- Service or Commodity **Required Date**

1. **Bid Type**. Select open or closed. Only select closed if all Grantee(s) are registered in COMMBUYS and restricting applicants to a select group of registered vendors. Most Grants will be OPEN.
2. **Info Contract. I**nput the contact name if it differs from the purchaser.
3. **Pre-Bid Conference**: 250 character field to capture BID conference information.
4. **Bid Description:** Must include title of the Grant (the word "Grant" must be included in title) and any other identifiable number. (Limit 160 characters).
   This is the key searchable field to locate the Grant and the key identifier for tracking within COMMBUYS.
5. **Purchaser**: Defaults to designated purchaser.
6. **Informal Bid:** If selected, Commonwealth users can see the submitted Grantee quotes before bid opening date (Grant Response Deadline).
7. **Show on Web**: This should be checked for Grants to ensure the bid displays and is searchable in COMMBUYS without having to login.
8. **Required Date**: Does not apply-leave blank
9. **Bid Type**: Open or closed
10. **Purchase Method**: For Grants, select Blanket only.
11. **Tax Rate**: N/A for Commonwealth
12. **Item Single Award Only**: Not applicable
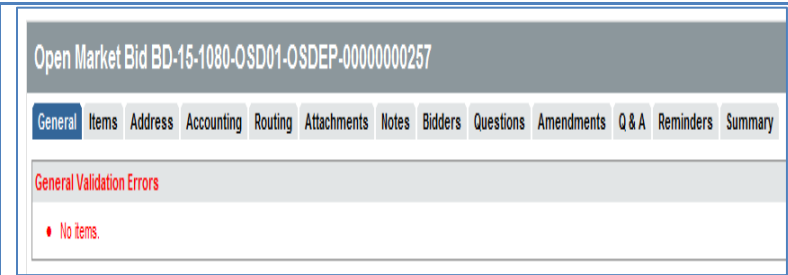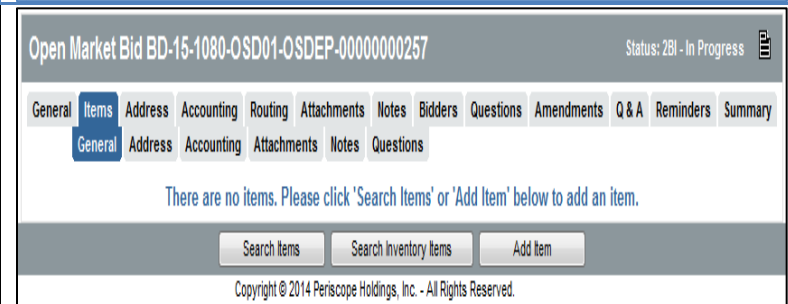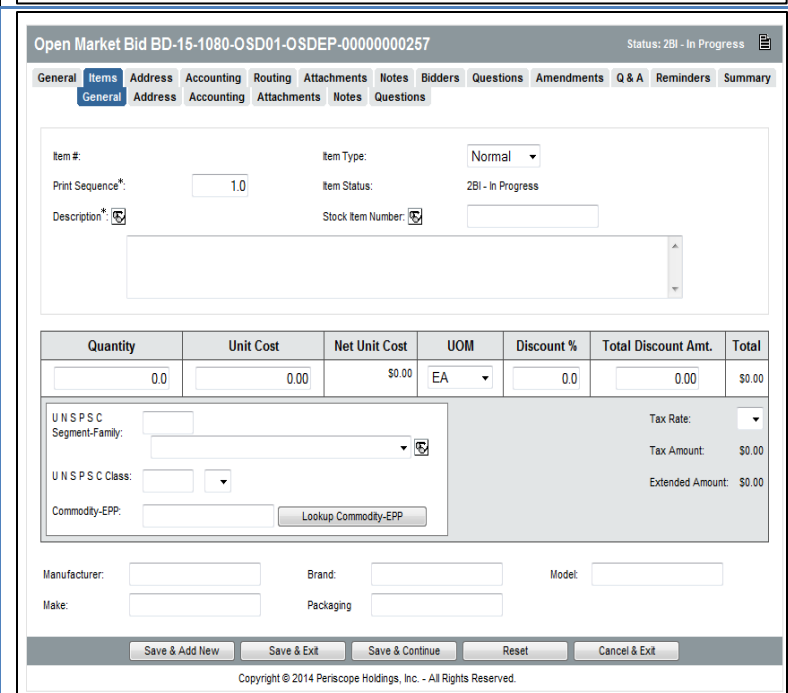13. **Info Contract**: add name of person for Grantees to contact.

Step 6

COMMBUYS assigns a Bid number and generates General Validation Errors (in Red) of 'No Items'. Click the **Items** tab to remove the error message and to add items to the bid.

Step 7

Click the **Add Items** Button to add item or services to the Bid.

Step 8

Input the item or service information. Major fields on this page include:

- **Print Sequence*** – Value defaults.

- **Description*** – Enter complete description of Grant, eligibility or Best Value Notice of Intent to Award.

- **Quantity** – Enter quantity (must be at least 1). If Grant is for a specific number, enter that quantity. If unknown, enter 1 (which will be used most often for Grants).

- **Unit Cost** – Enter cost, if known. (leave $0 if unknown)

- **UNSPSC** – Set of codes that classify goods and services into standardized groups.
  - Segment/Family
  - Class

- ***NEW* UNSPSC Grant Opportunity Code** – code number created within COMMBUYS for the Commonwealth of Massachusetts to codify a grant as opposed to a commodity is 000000. All Grants can be found under this code and it should be used in addition to other codes you choose to identify the required service.

- **Other Product Information** – These fields are optional.

	Step 9 After clicking the eyeglass icon, the Search Code screen populates. 1. Use the available search dropdowns and fields to find the best code. 2. Select the radio button on the left side of the screen to choose the best code(s), and click **Save & Exit** to return to the Items tab. Add as many items as required for the Bid by clicking **Save & Add New**. 3. Remember the **GRANT** Code to signify a grant as opposed to a commodity is 000000. All Grants can be found under this code and it should be used in addition to other codes searched for and chosen to identify the required service. 4. Click the **Save & Exit** button once finished with all required bid items and the **Items General** tab redisplays. 5. Click the **Address** tab to continue once all items are added.
	Step 10 1. Click the **Address** tab to continue the bid. 2. Review the Ship-to and Bill-to Addresses. 3. Click the Eyeglass icon to add or change either address. **Note**: Organization Administrators (OA) maintains the Ship-to and Bill-to addresses. To update or add additional addresses, contact the OA.
	Step 11 The Lookup Ship-to Address window displays. • Input the search criteria and click **Find It**. • If no criterion is entered, all possible addresses for the Organization will appear by clicking **Find It**.
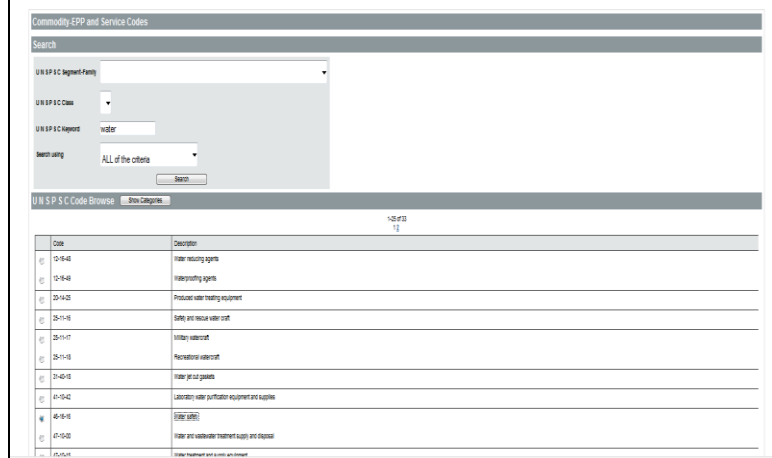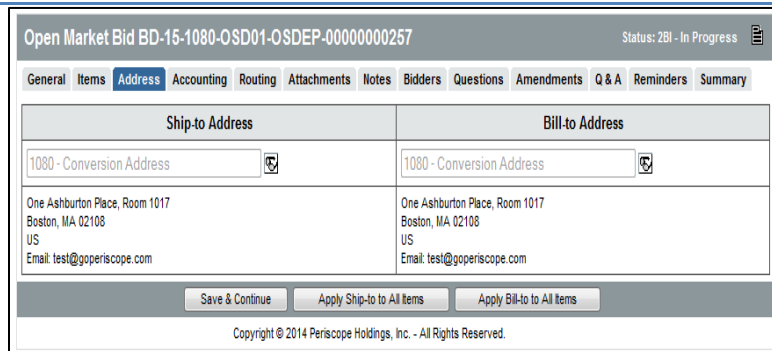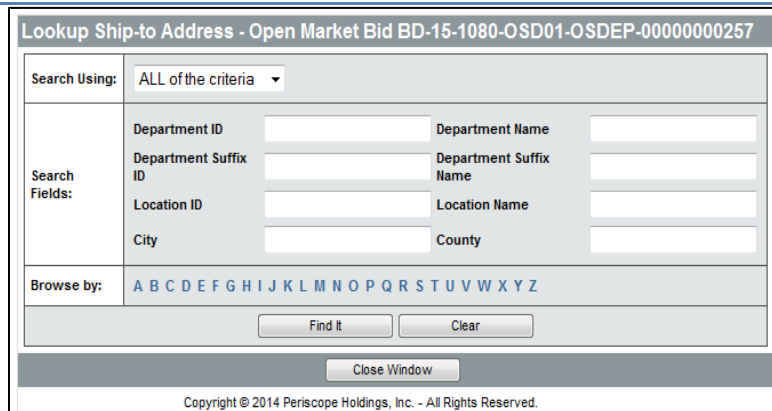
	Step 12
	The search results display.
	1. Check the **Select** radio button adjacent to the address you would like to select. Click the **Select** button at the bottom of the page.

	Step 13
	The search page closes and the selected address populates the Ship-to Address.
	Click **Save & Continue.**

	Step14
	1. **C**lick the **Attachments** tab. The **Attachments** tab displays. Attachments include **Grant Application** and **Required Forms/Contract Documents**.
	o For **Best Value Notice of Intent to Award**, the Notice and any supporting information should be posted as Attachments.
	2. Click the **Add File** button to add a new file.
	Note: Add Form is not currently a working function in COMMBUYS.

	Step15
	The Add File window opens. Complete the following fields:
	1. **Name** – Enter file name (Will auto populate if left blank.)
	2. **Description** – optional
	3. Click **Browse** to select a file.
	4. Click **Save & Continue** to add another file or click **Save & Exit** when all files have been added.

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 Status: 2BI - In Progress General Items Address Accounting Routing **Attachments(1)** Notes Bidders Questions Amendments Q & A Reminders Summary **Files**	Name	Description	Show Vendor	Attached By	Attached Date	Delete	Tulips.jpg	Test	☑	Buyer Buyer	08/21/2014	☐ **Forms** ⓘ Click **Add Form** to add form attachments. No Form Attachments Save & Continue Add File Add Form Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	**Step 16** The Attachments tab redisplays with the new file attached.
General Items Address Accounting Routing Attachments(2) **Notes** Bidders Questions Amendments Q & A Reminders Summary	Delete ☐	Note Date	User	Note				Sample Note.	Save & Continue Reset	**Step 17** Click the **Notes** tab (this is an optional tab). 1. Add any text or note in the Note box. Notes are viewable only by Commonwealth users. Vendors cannot access or view these notes. 2. When complete, click **Save & Continue**.
General Items Address Accounting Routing Attachments(1) Notes(1) **Bidders** Questions Amendments Q & A Reminders Summary General Subcontractors Quote Activity **Vendor Validation Warnings** • No bid bidder. Select bidder participation, open or closed, and select vendors to notify ○ Unrestricted bid, all vendors can view and respond ○ Restricted bid, only selected vendors can view and respond	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method					☐ Show Unit Prices to Vendors ☑ Hide Bid Holder List on Vendor Side ⓘ Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes. Save & Continue Lookup & Add Vendors Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	**Step 18** Click the **Bidders** tab. In general, a bid (RFR) should be open to all.(Unrestricted) Several options can be set on the Bidders tab: 1. **Select bidder participation** o **Unrestricted** – Any vendor can respond to the bid. (For Grants select Unrestricted.) o **Restricted** – Only listed vendors can respond to the bid. Should only be used for Grants when all eligible Grantees are confirmed as registered vendors in COMMBUYS. 2. **Show the Unit Price to Vendors** – When unchecked (default) bidders cannot see the unit price for bid items. 3. **Hide Bid Holder List on Vendor Side.** When checked (default), bidders cannot see who has responded to the bid. 4. Click **Save & Continue**. 5. Click **Lookup & Add Vendors**.

Lookup & Add Reference Vendors - Bid BD-15-1080-OSD01-OSDEP-00000000257 Search Using: ALL of the criteria ▼ Find It Clear Search Fields: Vendor ID _____ Vendor Name _____ Vendor Tax ID _____ Vendor Legal Name _____ Show ☐ Vendor Keyword _____ Alternate ID _____ ZIP Code _____ County _____ State ▼ ☐ Emergency Suppliers ☐ Reference Vendor U N S P S C Segment-Family ▼ U N S P S C Class ▼ U N S P S C Keyword _____ DUNS Number This is the DUNS number assigned to my Business Environmentally Preferable Product No ▼ MBE Certified Not Certified ▼ Prompt Pay Discount No ▼ Are you interested in partnering as a Prime/Sub contractor? No ▼ Geographical Service Area in Massachusetts Western Massachusetts ▼ Service Disabled Veteran Owned Business Not Certified ▼ SDO Certified Not Certified ▼ Business Structure Sole Proprietor ▼ AGREEMENT AND TERMS OF USE FOR SELLERS Yes Business Type Business Enterprise (for profit) ▼ Women Non-profit Organization (W/NPO) Certification Not Certified ▼ Program ☐ Small Business Purchasing Program Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10 Find It Clear Find Vendors for All Commodity-EPPs on the Bid Close Window	**Step 19** **Optional.** The **Lookup and Add Reference Vendors** screen displays. <u>This should be used to select non-public entities ONLY, if they are eligible to respond to the grant opportunity.</u> • Scroll to bottom of the screen and select **Find Vendors for All Commodity-EPPS on the Bid** button. The results will display with the Vendors who selected the same commodity code as the bid item(s). • COMMBUYS automatically matches the vendors who have correctly registered with the selected UNSPSC codes. These vendors will receive an email notification of the Bid.

Step 20	

Select ☐	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
☐	201987	O'Connor & Drew, PC				25 Braintree Hill Park Suite 102	Braintree	MA	David Dilulis	6174711120	No
☐	211456	Revenue Solutions, Inc.				2000 Opportunity Drive Suite 100	Roseville	CA	Jeff Huber	9167808741	No
☐	00000514	The Parris Company, Inc.				PO Box 51501	Boston	MA	Mischa Parris	(781)519-9829	No

Save & Exit   Save & Continue   Find Vendors for All Commodity-EPPs on the Bid   Close Window

Message from webpage   ✕

⚠ Warning: All vendors have been selected for email notification. A large quantity of vendors may take several minutes to process.

OK

A popup window displays with a Warning Message when selecting a large number of vendors.

• Click **OK**. The popup window will disappear and all information populates in the bid.

• Click **Save & Exit** to return to the Vendors tab

Step 21

The Vendors tab will now display all the Vendors who selected the same UNSPSC codes as the Grant.

Step 22

1. Click the **Questions** tab. (This is an optional tab.)The Questions tab allows you to create questions for the vendor to answer with a supplied response type.

2. You can make these questions a required response by checking the **Required** box.

3. To change the **Response Type**, chose from the available dropdown options.

4. Once all questions are entered, click **Save & Continue.**

Step 23

- Click the **Q&A** tab. (This is an optional tab.) The Q&A tab allows vendors and the Commonwealth to dialog within the bid. This feature is only usable before the bid opening date; however, the questions and answers remain viewable after the bid is opened.

In addition to adding the questions, there are two options on this page:

- **Allow Vendor to submit questions** – Make sure to check if questions are allowed for the bid.
- **Send notification when vendor sends question** – Use if you want notifications of questions sent in COMMBUYS.

Click **Save & Continue** after entry of each question.
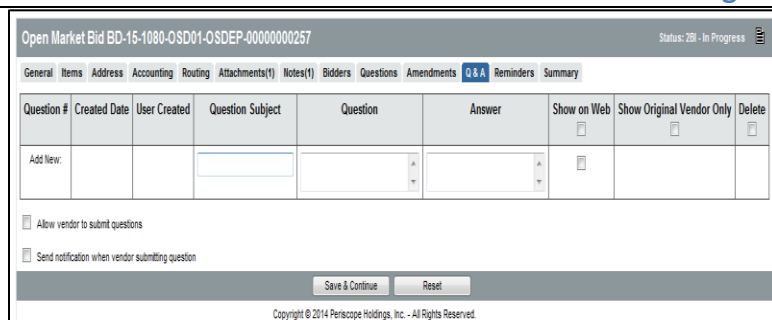
Step 24

Click the **Reminders** tab. (This is an optional tab.)

To create a reminder, input the information on the **Reminder** tab including:
- o Due Date
- o Comment
- o Remind Whom
- o Days Prior to Remind
- o Send Email

When the reminder is sent, the tab updates with the Date Completed.

Job Aid:
How to Create a Grant Posting from Scratch in COMMBUYS

Step 25

Click the **Summary** tab.

The Summary tab provides a recap of the bid information. Shown here is the upper part of the Summary tab.

Step 26

Shown here is the lower part of the Summary tab that provides a summary of each item on the bid as well as the action buttons currently available for the bid:

- **Submit for Approval**
- **Cancel Bid**
- **Clone Bid**
- **Print**

After reviewing the information, click the **Submit for Approval** button to submit the bid into workflow for approval routing.

Skipped Tabs:
- **Accounting:** Not in use at present.
- **Routing:** Populates after submission for approval.
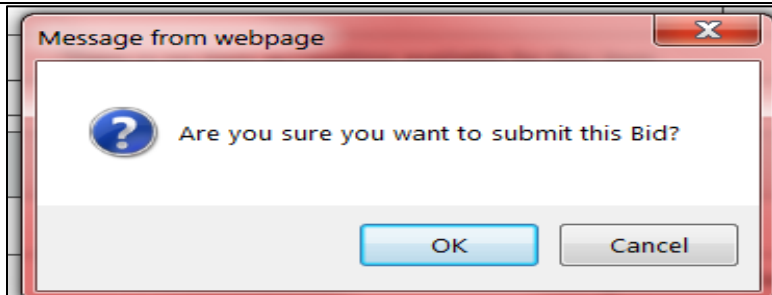
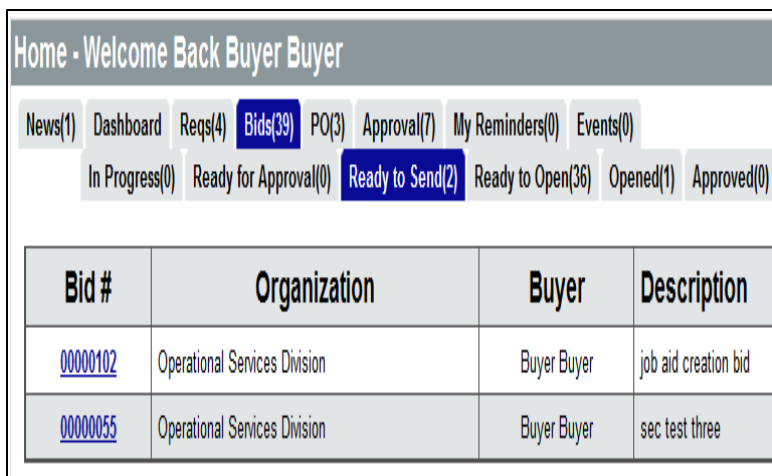|	
	Step 27 A Popup message displays stating, 'Are you sure you want to submit this bid?' Click **OK** to continue with the submission. To cancel the submission, click **Cancel**.
	Step 29 The Summary tab redisplays showing a status of Ready for Approval.
	Step 30 Once the bid is approved, the bid's status will update in your Control Center. The status will change from Ready for Approval to Ready to Send. Click the blue hyperlink **Bid #** to open the bid.
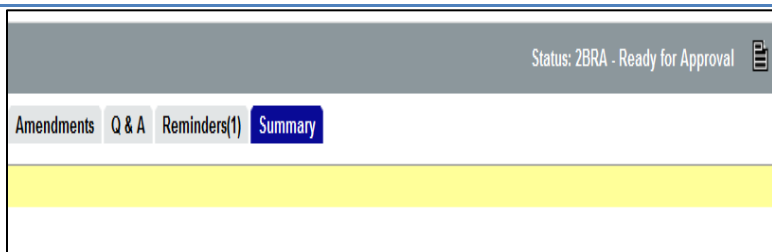
Pre-bid Approval Path:							
Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved/Ca
	Linda Banks-Grant	1		1	Primary	01/15/2014 05:20:17 PM	01/15/2014 05:23:43 PM

Send Bid Actions

Option(s) ⦿ Change bid status to "Sent" and notify vendors   ○ Change bid status to "Sent" only.

[Send Bid]

[Cancel Bid] [Clone Bid] [Print]

Step 31

The bid opens to the Summary tab. Scroll to the bottom of the page.

Under Send Bid Actions, Select the appropriate RADIO button option:

- **Change bid status to 'Sent" and notify Vendor -** general rule to send email
- **Change bid status to "Sent' only** – posts the Bid on COMMBUYS, but does not send an email notification to the selected bidders.

- Click on **Send Bid** button. The bid is now posted on COMMBUYS,

Vendors may be able to respond depending on the available date set on the General tab.

NOTE: If changes to this bid are required, follow the **"How to Create a Bid Amendment"** job aid**.**